Step 1 : Installation & Saving

Templates
➢ Save entire CD contents to the root directory of the C: drive.
➢ Retain default directory structure.

Macros
➢ Load the "Personal" file to C:/Documents and Settings/ *your user name*/Application Data/Microsoft/Excel/ XLSTART.

Tools
➢ Set-up the Macro toolbar using Tools ⇨ Macros, then select the "Toolbar" listing and click "Run" to launch temporary toolbar.
➢ Close all Visual Basic screens opened by the tool.
➢ Assign macros and names to the toolbar buttons (see Page 5 of Guide).

Saving Files
➢ Save files to C:/CFP Tools and Templates/CFP Individual Projects/Desired Program Area.

Step 2 : Table of Files

➢ Enter each template through the "Table of Files" button (second to last) on the special toolbar.

Step 3 : Preliminary Planning

CFP Process Task List & Flowchart
➢ Step-by-step list/visual flowchart of entire CFP process.

City Owned Property Matrix
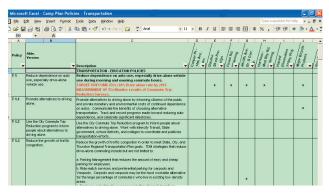➢ Complete listing of properties owned by a jurisdiction.

Public Works Project Profile
➢ Form used to document information about each Public Works project.

Comprehensive Plan Policies Matrix
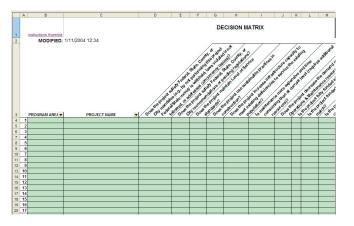➢ A tool for matching Comp Plan polices to various properties.

Documentation Matrix
➢ Documents information related to impact studies and planning activities associated with any CFP project.

Decision Matrix
➢ Prioritizes projects according to levels of criteria for determining their status in the CFP.
➢ Edit criteria as needed and enter data for each project.
➢ Go to the background tab to see point values for criteria selected.
➢ Click the "Blanks" button on the CFP1 toolbar to calculate totals for each project.

Step 4 : Project Scoping & Estimating

Project Plan
➢ Includes several worksheets used for tracking types of employees and costs, as well as construction close-out resources.

Construction Planning Matrix
➢ Used for scheduling each project phase and the various components.

Scoping Worksheet
➢ Used for identification of potential project problems.

Land and ROW Matrix
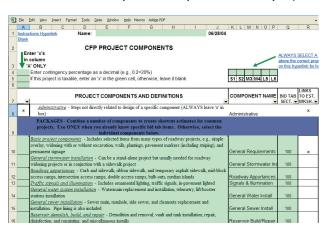➢ Used for determining project land and employee costs.

Permit Matrix
➢ Used for documenting project permits.

Public Communications Matrix
➢ Used for developing a public communications plan for each project.

CFP Project Components
➢ Create one for each project in your plan.
➢ Enter project name, size (required), contingency rate, and tax status.
➢ Place correspondeing "x's" in column A.
➢ Switch to "Estimate Worksheet" and fill in quantities in column G.
➢ Filter column A for "x."
➢ Save a completed template for each project.

CFP Project Costs
➢ Combines all project costs, formating them into a series of worksheets suitable for presenting.
➢ Output documents include project costs for previous and current planning periods.
➢ Only green cells can be edited.

Step 5 : Document Prep

➢ Templates used to create CFP text files.
➢ Samples documents include "Table of Contents," 'Introduction' and 'New and Completed' for each of the nine program subsections.
➢ Table grids inside the documents will import data from project worksheets when double-clicked.
➢ Titles also pre-fill when double-clicked.

Step 6 : Project Management

➢ Section includes many duplicate templates.
➢ Project Scorecard worksheets are project field tracking tools and include individual and team versions.